CProQuest®   Return to NPL Web Page Text Version [English   ☑]   ?Help

[🗃 Collections] [🔍 Search Methods▼] [🌐 Topic Finder] [📖 Browse Lists] [Results & Marked List▽] [Search Guide]

Searching collections: **All Collections**   **Article Display**

[Email Article]   ⊙ Article 2 of 11 ⊙   Publisher Info.
[Print Article]   ☐ **Mark article**   Article format: [Full Text   ☑]
[Save Link] Saves this document as a Durable Link under "Results-Marked List"

Mail merge
Macworld; San Francisco; Apr 1993; Heid, Jim;

Volume:	10
Issue:	4
Start Page:	195
ISSN:	07418647
Subject Terms:	Word processing
	Techniques
	Manyproducts
	Mailing lists
	Direct marketing
	Desktop publishing
Classification Codes:	9190: *US*
	7400: *Distribution*
	5240: *Software & systems*
Geographic Names:	us

Abstract:
*The most popular Macintosh word processors, such as Microsoft Word 5.1, MacWrite II (Claris), and WriteNow 3.0 (T/Maker), have **mail merge** features that allow conditional merges. WordPerfect 2.1 and WriteNow allow the user to type in text during the merge, so that personal comments can be added to a letter. A **mail merge** project generally requires 3 components: 1. a data **file** containing the information to be inserted in each letter, 2. a word processor document with the boilerplate text, and 3. a word processor document into which the data **file** is imported. For fancier page-layout and typographic features than a word processor can provide, **database publishing** combines data with a desktop **publishing** program. When using a **publishing** program, a 3rd-party utility is required to create the template documents. Aldus PageMaker and QuarkXPress also include a special font for printing the bar codes necessary to obtain discounted postal rates.*

Full Text:

Dear <<name>>: If you are like many job titles, you have compiled a **database** of **customers** who use your product. Now and then, you want to notify your **customers** of a <<sale/special offer.>> Or perhaps you want to inform them that their accounts are <<paid up/past due.>> In any case, you want your letters to be personally addressed--none of that Dear valued **customer** stuff.

You're a candidate for **mail merge**.

Mail merge is the science behind all those publishers' sweepstakes mailings, magazine subscription offers, and checkup reminders from your dentist. **Mail merge**, also called print merge, is the process of combining, or merging, a data **file** with a text document. Usually created in a word processor, a text document contains the

letter's boilerplate text--the stuff that doesn't change from one **recipient** to the next. The data **file** contains the names, addresses, account informadon, and so on. You create the data **file** by extracting data from a **database** or spreadsheet program or by typing it directly into a word processor. You then merge the data **file** with the boilerplate text to create that oxymoronic marvel of the computer age: the personalized form letter.

The Macintosh world's most popular word processors have **mail merge** features that go beyond simple form letters. Microsoft Word 5.1, MacWrite II (Claris), and WriteNow 3.0 (T/Maker) allow conditional merges--if x is true, then insert text y; otherwise insert text z. If an account is paid up, thank the **recipient**; if not, remind the deadbeat to mail that check. Word, WordPerfect 2.1, and WriteNow let you type in text during the merge, so you can add personal comments to letters. You can also use this capability to prepare other types of documents, such as legal contracts--store all the boilerplate contract text in one document, and then type the information specific to a particular contract during the merge.

Mail merge is one of those word processor features that gets dusty from disuse. True, many people don't need to send personalized form letters. But another reason may be that the merging process isn't as easy as point-and-click. Merging data with canned text usually means walking the dark alleys of data expo and import--transferring information out of a **database** (or spreadsheet) program and into a word processor. **Mail merge** also requires some advance setup time and troubleshooting, lest you get weird results like "Dear Mr. 123 Main Street."

This month I give step-by-step instructions for using the **mail merge** features in Word, WordPerfect, and WriteNow. For a **database** program, I'll use Claris's popular FileMaker Pro 2.0. See "Easier Merging" for an introduction to the **mail merge** features in two popular integrated programs, ClarisWorks and Microsoft Works. Their **mail merge** features aren't as sophisticated as those of the word processors, but they're easier to use because you don't have to move data from one program to another.

PREPARE TO MERGE

A **Mail Merge** project generally requires three components (see "**Mail Merge** Illustrated"):

* A data **file** containing the information to be inserted in each letter. The data is arranged in typical **database** fashion: a collection of fields (the name, address, city, state, zip code, and so forth) and **records** (all the fields for one entry--for example, one person's name and address).

* A word processor document with the boilerplate text, including field-name codes that show where the information from the data document is supposed to go. In Word, this is called the main document. In WriteNow, it's the template document, and in WordPerfect, it's the primary **file**. (I use the term template docrument here, since it reflects the fact that the document is a template for each custom form letter.)

* A word processor document into which you import the data **file**. In Word and WriteNow, this is called the data document. In WordPerfect, it's called the secondary **file** or the address **file**. (I use the term data document, since it's more descriptive.)

After you assemble these three pieces, you tell your word processor to begin merging. The word processor then creates a new, untitled document--the merge document--containing the boilerplate text as well as the data from each **record** of the data document, with page breaks separating each form letter.

There are several variations to these basic steps. You can instruct your program to discard the merge document after it's printed, or you can choose to save it. You can work without a data document, typing in all your information from the keyboard as each new letter appears instead. As I mentioned earlier, you can dispense with a **database** or spreadsheet program entirely by creating the data document within your word processor; Word's table feature comes in handy for this. In WordPerfect, you can run a macro (an autopilot-like series of commands) during the merge. I'll look at some of these merge variations shortly.

EXPORTING THE DATA

Before you start up a word processor, you need to export your data, creating a text-only **file** that you will then import into the word processor to create the data document. This export-import routine is one of **mail merge's**

tallest hurdles--it's the reason many people resort to the Dear vabed nstomer approach.

Exporting and importing is necessary because a word processor can't directly read the **files** created by a **database** or spreadsheet program--they are different types of tools. You can't use a word processor to open a FileMaker Pro **database** any more than you can use a can opener to open a bottle of wine.

For your word processor to be able to distinguish one data field from another and one **record** from the next, fields and **records** must be separated by special characters called delimiters. The most common delimiting scheme involves separating each field by a tab character and each **record** by a carriage return. A **file** organized this way is often called a tab-delimited textfile. Another scheme involves separating fields with commas instead of tabs and enclosing each field item within quotation marks ("/")--the comma-delimited format. Microsoft Word and WriteNow work with either format. WordPerfect requires data documents to be in a special format I'll describe later.

There's another important piece of information a word processor needs before it can accomplish a successful merge: a line at the top of the data **file** that contains the name of each data field being used. This line is generally called a header **record**. If you're using FileMaker Pro to create your data **file**, simply save it in the program's megefomzat. It's identical to the comma-delimited format, with one exception: it automatically inserts a header **record** into the data **file**. If you use a **database** or spreadsheet program that can create only standard comma-or tab-delimited text **files** rather than merge-format **files** you'll have to type the header **record** yourself after you've imported the data **file** into your word processor.

HOW TO: FILEMAKER PRO

With any version of FileMaker Pro, to create a data **file** for merging, first be sure to select the **records** vou want to export. (If you previously used the Find command to select only certain **records**, then only those **records** will be exported. To export the entire **database**, choose Find All from the Select menu.) Next, choose Export from the **File** menu, type a name for the merge **file**, and choose Mere from the **File** Type pop-up menu. Click on New, and up comes a dialog box that lets you choose which fields to export. If there are fields you don't want to export, click on the check mark next to their names. Click on OK when you've finished, and FileMaker Pro exports the **database**.

The **file** you just created is your data document--it contains the information that will be inserted into your form letters. Your next job is to prepare the template document--the one that tells your word processor where and how to insert information from the data document. If you used a **database** or spreadsheet program to create your data **file**, you can quit it now. From this point on, you'll use only your word processor.

MERGING WITH MICROSOFT WORD

wORD 5.0 AND jl PROVIDE A PRINT merge hclpe which walks you through the process of choosing a data document and creating the template document.

HOW TO CHOOSE A DATA DOCUMENT:

Choose New from the **File** menu and then choose Print Merge from the **File** menu. In ord's Print Merge dialog box, select the Merge and Save Results in New **File** option, and then click on the Show Helper button. A dialog box asks you to select the data document. Locate the data **file** you previously created and double-click on its name. If a dialog box appears asking you to select the Text or Text With Layout format, choose Text. In a moment you'll see the Print Merge Helper bar (see "Merging with Word"). Below it, a special instruction line called the data statement, tells Word which **file** to use for the data document.

The data statement—and all other merge-related commands that appear in a template document--must be surrounded by the international quotation mark characters, << and >>. Word's Print Merge Helper bar inserts these characters automatically as you choose field names and other merge statements. You can also type the characters by hand: press the keystroke combination option-backslash (

) for the << character and shift-option-backslash for the >> character.

HOW TO CREATE THE TEMPLATE DOCUMENT:

Type and format the boilerplate text of the form letter. When you want to insert the contents of a certain field, choose its name from the Insert Field Name pop-up menu. Some lines-such as the **recipient's** address in a business letter--might contain only field names. If you want a field's contents to appear in a different font, size, or style, highlight the field name and specify the format.

Next to the Insert Field Name pop-up on the Print Merge Helper bar is the Insert Keyword pop-up. This menu enables you to insert keywords that tap Word's specialized print-merge features. For example, the IF... ELSE...ENDIF series of keywords lets you create those conditional merges I mentioned earlier. The ASK keyword displays a dialog box that lets you type in some information during the merge. Save the template document when you're finished. (You might want to include the word template in its name to remind you of the document's purpose.)

The best way to try out the template document is to click on the second icon from the right on the Print Merge Helper bar. This tells Word to merge the data and template documents and create a new **file** containing the results. As you look over the resulting merge **file**, make sure that each piece of data has the right number of word spaces around it--it's easy to wind up with incorrect spacing, especially when you're inserting one field immediately after another or using the IF...ELSE keywords.

Notice that each form letter in the merge **file** is separated by a section break--which is indicated by two parallel dotted lines when the merge document is displayed in normal view. The section break is what causes each letter to begin on a new page, which you can see by switching to page view.

If the form letters look correct, you can print them. You can save the merge document if you anticipate printing the form letters again, but you don't have to save it; you can always generate the merge document again if you save the data and template documents.

MERGING WITH WRITENOW

The basic steps behind merging with WriteNow are very similar. WriteNow uses the same merge characters (<< and >>) and keywords as Word; you can generally move template and data documents between Word and WriteNow and use them without modification.

There is one big difference: WriteNow doesn't provide a Print Merge Helper, so you must type field names and keywords yourself. See page 244 in the WriteNow 3.0 manual for details.

HOW TO CREATE THE MERGE DOCUMENT:

When you've finished creating the template document, save it. To perform the merge, choose Merge from the **File** menu. In the dialog box that appears, click on the New Document button. (You could click on the Printer button, but it's better to merge to a new document that you can proofread for errors.)

After you click on New Document (or Printer), a dialog box appears asking if the data document has line breaks inserted. Click on No, and the merge tabes place. Like Word, WriteNow formats the merge document so that each form letter begins on a new page.

MERGING WITH WORDPERFECT

A WordPerfect template document, called a primary **file**, looks much like a Word or WriteNow template document, with field codes indicating where information from the data document is to be inserted. The field codes themselves are a bit different; field names, for instance, are enclosed in greater-than and less-than signs (< and >), not the << and >> characters (see "WordPerfect Merging"). Also, WordPerfect simply numbers fields instead of requiring you to give them descriptive names.

HOW TO CREATE A PRIMARY **FILE**:

Choose Merge from the Tools menu to display the Merge dialog box, which looks like a window. To insert a field code, double-click on the Field Number command in the Merge box. In the Field Number dialog box, specify a number for the field; if you want to be prompted for a field name or number during the merge, choose the Prompt for Field Number option. Save and close the primary **file** when you've finished.

Where the data document is concerned, WordPerfect breaks from the pack. WordPerfect can't use any of the standard text-only formats-tab-delimited, comma-delimited, or merge. Instead, you need to manually indicate where fields and **records** end by inserting end offield and end ofreeord codes. This adds extra work to the merging process. Fortunately, you can use the Find/Change command to automate some of the work.

HOW TO CREATE A SECONDARY **FILE**:

When exporting a **database**, create a tab-delimited text **file**. Open this **file** in WordPerfect and use Find/Change to change each carriage return code to a carriage return followed by an end-of-**record** code and a carriage return. (The carriage return is called a hard retivm in the Find/Change dialog box's Insert menu.) Next, use Find/Change to change each tab code to an end-of-field code followed by a carriage return. If you like, you can give descriptive names to each field; see the Merge section of the WordPerfect user guide for details. Save the resulting **file** as a WordPerfect document and then close it.

HOW TO CREATE A MERGE DOCUMENT:

To perform the merge, choose New from the **File** menu, then choose Merge from the Tools menu. Double-click on the Start Merge option, and then select the primary and secondary **files** when prompted. WordPerfect inserts a page break between each form letter.

OTHER MAILING OPTIONS

I've concentrated on word processors and FileMaker Pro here, but these programs don't have a monopoly on **mail merge**. If you need fancier page-layout and typographic features than a word processor can provide, consider **database publishing**--combining data with a desktop **publishing** program. The basic concepts are similar, except you use a **publishing** program and a third-party utility to create the template documents. For Aldus PageMaker, the best **database publishing** tool is DataShaper (Elseware, 206/547-9623). For QuarkXPress, it's xdata (Em Software, 800 /253-8472; 203/399-8472). Both programs also include a special font for printing the bar codes that enable you to obtain discounted postal rates. This nifty feature means you can send mass mailings of bar-coded envelopes without having to pay a small fortune to a mailing house. (For details on **database publishing**, see "**Publish** Your **Database**," Macworld, February 1991.)

If you become a mailing-list maven, consider Satori Software's BulkMailer, a **database** program designed for managing mailing lists. BulkMailer can identify and remove duplicate entries, calculate mailing costs, sort according to carrier routes, and print labels with or without postal bar codes. BulkMailer can also export a **database** as a merge-format or tab-delimited text **file**. The program's manual includes an excellent introduction to postal rates and delivery options. And if you've got a fax modem, you can forgo the mails entirely, using **mail merge** to churn out personalized faxes.

In fact, with **mail merge** features and programs such as BulkMailer, small businesses--and even individuals--can routinely employ the same direct-mail sales techniques that were formerly the domain of big business. Yes, you too, dear Macworld reader, can produce customized formletters.